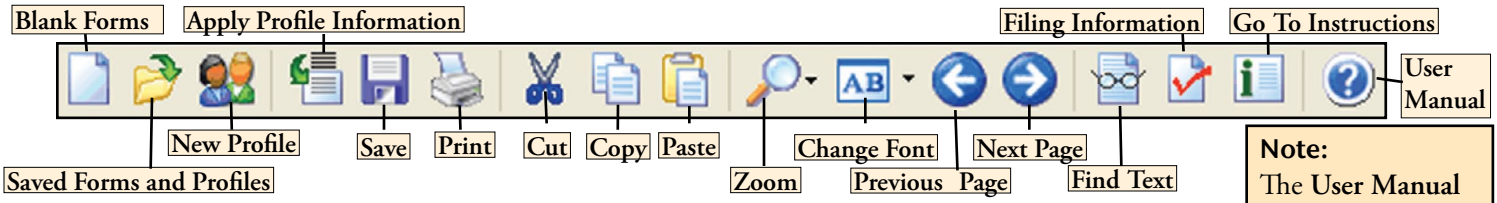
BNA Tax and Accounting Center

How To Use Interactive Forms on CD

All BNA Interactive Tax Forms are government approved. To guarantee filing requirements are met, automated form processing requirements for barcodes, scanlines, validation fields etc., are built in. New and updated forms are added to the collection as they are released by the issuing agencies. To access Tax Forms, load the **Tax Forms** disk, and click the **Interactive Forms** icon placed on the desktop.

1. Toolbar

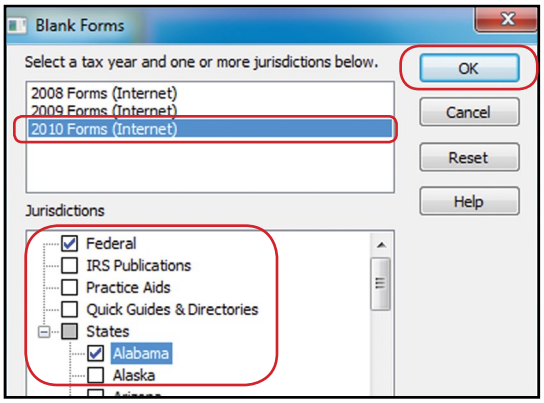
Explanatory tool tips describe the toolbar icons.



Note: The **User Manual** contains in-depth information about all functionality. For Tutorials, go to Help|Tutorials.

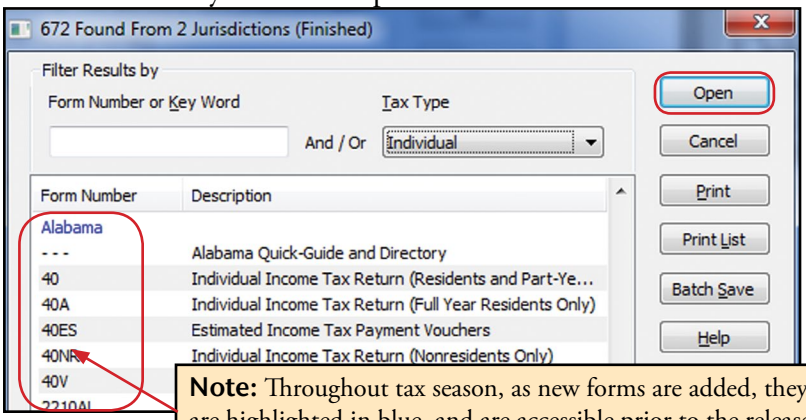
2. Blank Forms

Click the **Blank Forms** icon. Choose a tax year and jurisdiction(s). Click **OK**. To open previously saved forms, click **Saved Forms and Profiles** on the toolbar. Click **OK**.



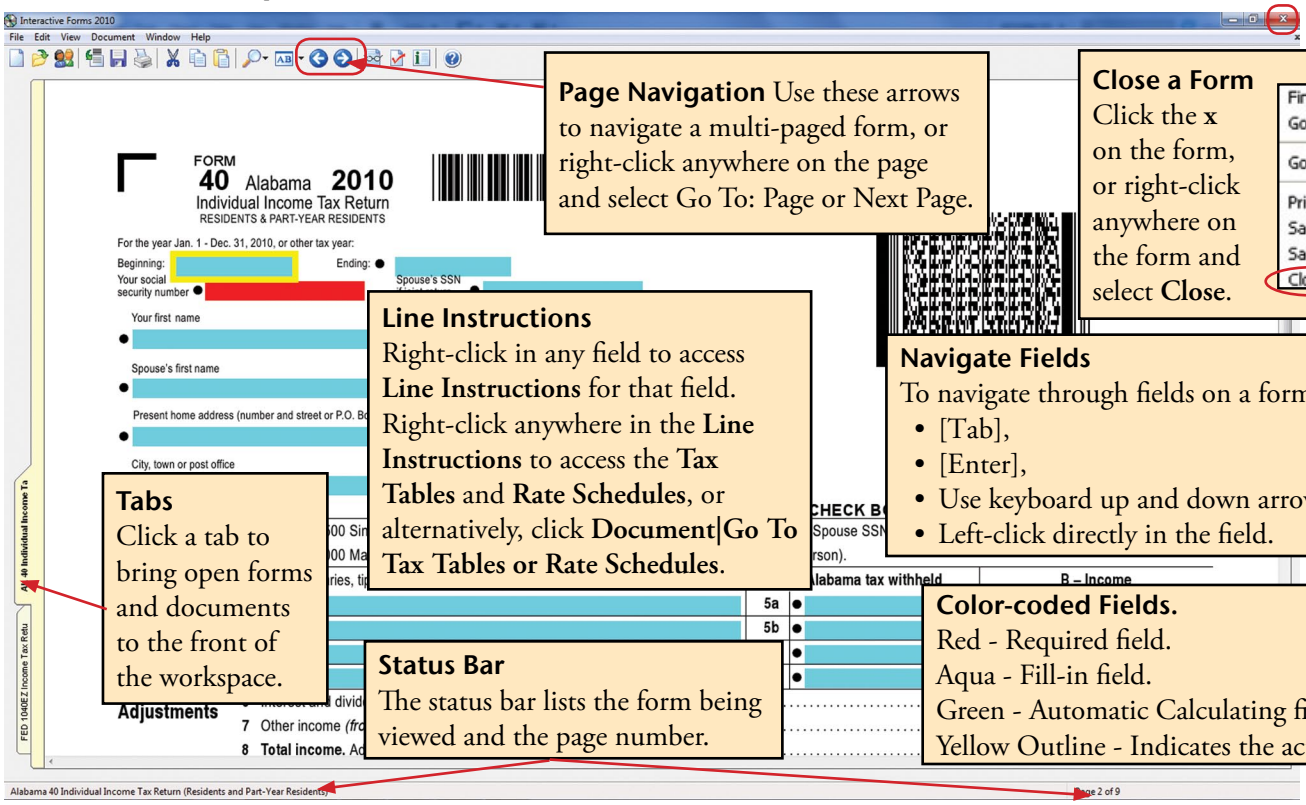
3. Select a Form

Locate forms by the form number, key word, or browse forms by tax type. Select the form(s) you wish to view, and click **Open**. Use the [Ctrl] key to simultaneously select multiple forms.



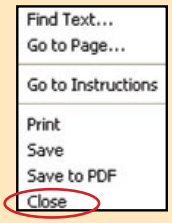
Note: Throughout tax season, as new forms are added, they are highlighted in blue, and are accessible prior to the release of the next disk, via Internet connectivity.

4. Forms Workspace


Interactive Forms 2010
File Edit View Document Window Help
FORM
40 Alabama 2010
Individual Income Tax Return
RESIDENTS & PART-YEAR RESIDENTS
Adjustments
Alabama 40 Individual Income Tax Return (Residents and Part-Year Residents)

Page Navigation Use these arrows to navigate a multi-paged form, or right-click anywhere on the page and select Go To: Page or Next Page.

Close a Form
Click the **x** on the form, or right-click anywhere on the form and select **Close**.



Line Instructions
Right-click in any field to access **Line Instructions** for that field. Right-click anywhere in the **Line Instructions** to access the **Tax Tables** and **Rate Schedules**, or alternatively, click **Document|Go To Tax Tables or Rate Schedules**.

Navigate Fields
To navigate through fields on a form use:

- [Tab],
- [Enter],
- Use keyboard up and down arrows, or
- Left-click directly in the field.

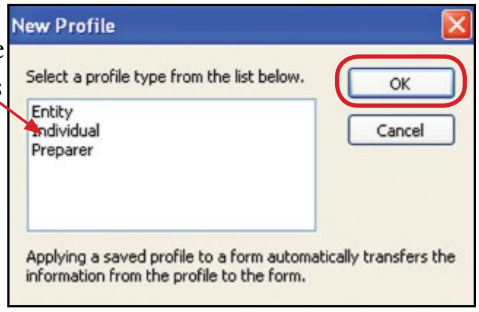
Tabs
Click a tab to bring open forms and documents to the front of the workspace.

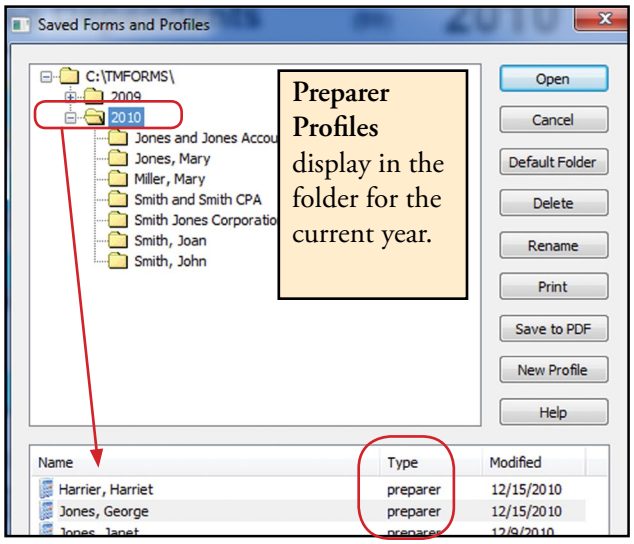
Status Bar
The status bar lists the form being viewed and the page number.

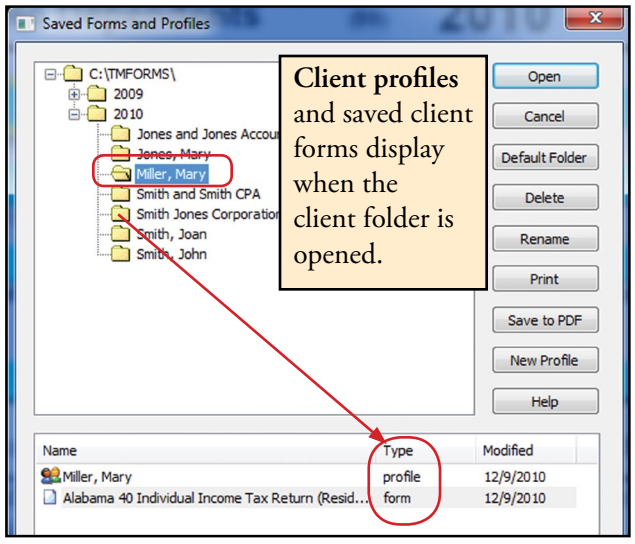
Color-coded Fields.
Red - Required field.
Aqua - Fill-in field.
Green - Automatic Calculating field
Yellow Outline - Indicates the active field.

5. Profiles

- Profiles allow for the reuse of taxpayer information.
- To create a new profile, click the **New Profile** button and select a profile type. Click **OK**. Fill out the Profile template and **Save** it. Forms and profiles save to the default **TM Forms** folder on your hard drive.
- To load a profile on a blank form, click **Apply Profile Information**. Open the client folder, select a profile (files end with .preparer or .profile.
- Click **Open**.
- To use Saved Forms and Profiles:
  - Click **Saved Forms and Profiles**.
  - Select a client folder in the upper frame of the **Saved Forms and Profiles** window.
  - The list of saved forms and profiles displays in the bottom frame of the **Saved Forms and Profiles** window.

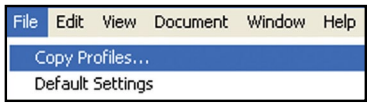

New Profile
Select a profile type from the list below.
Entity
Individual
Preparer
OK
Cancel
Applying a saved profile to a form automatically transfers the information from the profile to the form.

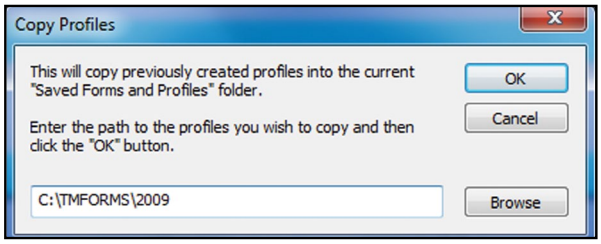




Copy a Previous Year's Client Profiles to Current Year's Client Folders

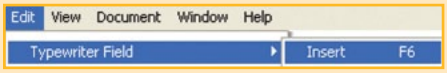
1. Click **File|Copy Profiles**.
2. The dialog box opens with the path to **previous year's forms**. (Browse to the previous year if it is NOT the previous year).
3. Click **OK**. Profiles are automatically copied to the current year's folder. If identical client names exist, information for each client is numbered (e.g., smith 2, smith 3, etc.) and placed (during import) in a data folder which may contain information and profiles for multiple clients.




Copy Profiles
This will copy previously created profiles into the current "Saved Forms and Profiles" folder.
Enter the path to the profiles you wish to copy and then click the "OK" button.
C:\TMFORMS\2009
OK
Cancel
Browse

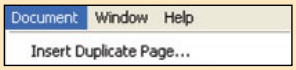
How Do I...

Add a Field to any form? Click **Edit** on the menu bar and select **Typewriter Field | Insert**.

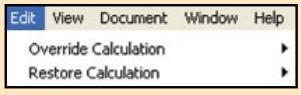


Size the Text on a form? Click **Zoom** on the toolbar.

Insert a Duplicate Page? Save the form and click **Document | Insert Duplicate Page** on the menu bar. Note that duplicate pages should not contain any data or calculations before being duplicated, and may not be removed. **Duplicate pages do not contain the green calculating fields.**



Override or Restore Calculations?
Click **Edit | Override Calculation** or **Restore Calculation**.



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